**Strategy Document: MarkIt Insights**

**Sign-off matrix:**

|  |  |  |
| --- | --- | --- |
| **Name** | **Team / Role** | **Date** |
| Raj P. | BI Analyst | Feb 27, 2024 |

**Proposer:** Raj, BI Analyst

**Status:** [Draft] > Under review > Implemented | Not implemented (Highlight current status)

**Primary dataset:** MarkIt online platform user behavior data

**Secondary dataset:** Not available

## User Profiles [Who is the intended audience for this dashboard? How do you expect them to use this dashboard?]

## Intended Audience:

## Stakeholders: Alice Shi (VP of Sales), Matías Sosa (Program Manager), Team members

## Analysts: Sam Winters (Data Analyst), Ariana Tirado (Data Warehousing Specialist), Cornelia Vega (Manager, Data Governance)

## Usage: Stakeholders will use the dashboard to gain insights into user behavior, identify pain points in the sales process, and inform decision-making regarding platform improvements. Analysts will utilize the dashboard to conduct in-depth analysis and derive actionable insights.

# **Dashboard Functionality**

|  |  |
| --- | --- |
| **Dashboard Feature** | **Your Request** |
| Reference dashboard  (Should this dashboard be modeled on an existing dashboard? If so, provide a link and describe the similarity.) | No specific reference, but design should prioritize accessibility and user-friendliness. |
| Access  (How should access to the dashboard be limited? Who needs to have access?) | Limited access to stakeholders and relevant analysts. Access should be restricted to authorized personnel only. |
| Scope  (What data should be included or excluded in this dashboard?) | Include data related to user engagement metrics, sales process metrics, and search query behavior. Exclude personally identifiable information (PII). |
| Date filters and granularity  (Should the dashboard include date filters? If so, what time frame should be displayed by default? Should the dashboard include a “granularity” drop-down? If so, what granularity should be selected by default?) | Include date filters allowing users to analyze data across different time frames (daily, quarterly, yearly). Default time frame should be set to quarterly. Granularity drop-down should include options for daily, weekly, monthly, and yearly, with default set to monthly. |

# **Metrics and Charts**

Create a table for each chart that you’d like to include in the dashboard. If you’d like to break the dashboard under different headers, feel free to list those here as well.

### Chart 1

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | User Engagement Metrics |
| Chart type  (What type of chart needs to be created?) | Line chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Time (daily, weekly, monthly, yearly) |
| Metric(s)  (What metrics are relevant to this chart?) | Time spent on site, number of listings posted |

### Chart 2

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Sales Process Metrics |
| Chart type  (What type of chart needs to be created?) | Bar Chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Time (daily, quarterly, yearly) |
| Metric(s)  (What metrics are relevant to this chart?) | Number of sales completed, number of listings deleted |

### Chart 3

|  |  |
| --- | --- |
| **Chart Feature** | **Your Request** |
| Chart title | Search Query Behavior |
| Chart type  (What type of chart needs to be created?) | Pie chart |
| Dimension(s)  (What dimensions does this chart need to include?) | Search query terms |
| Metric(s)  (What metrics are relevant to this chart?) | Frequency of search terms used |

### Dashboard mockup

[Here we can include sketch of dashboard]

**Note**: The dashboard mockup will be provided after stakeholder review and approval of the strategy document.

**Follow-ups Questions for Clients are shown below:**

1. **User Access and Permissions**: Could you provide clarification on the specific roles or departments within the organization that require access to the dashboard? Additionally, are there any restrictions or limitations regarding data access for certain user groups?

2. **Dashboard Scope and Content**: In terms of the dashboard's scope, are there any specific key performance indicators (KPIs) or additional data points that stakeholders believe are essential for understanding platform performance and user behavior? Additionally, are there any metrics or insights that stakeholders are particularly interested in exploring?

3. **Granularity Preferences**: Regarding the date filters and granularity options, do stakeholders prefer the default granularity setting? For example, would they prefer the dashboard to default to a monthly view, or do they have another time frame in mind that is most relevant to their decision-making processes?

4. **Data Accuracy and Reliability**: How confident are stakeholders in the accuracy and reliability of the data being used to populate the dashboard? Are there any known data quality issues or concerns that should be addressed during the dashboard development process?

5. **Feedback Mechanisms**: Finally, how do stakeholders envision the feedback loop for the dashboard once it's implemented? Will there be regular review meetings or channels for users to provide feedback on the usability and effectiveness of the dashboard in meeting their needs?